



SOP Starter Checklist

An SOP (standard operating procedure) is a short, written **"this is how we do it here."** A good one lets someone other than you do the job right the first time, so your shop doesn't run on one person's memory, usually yours. Use this page to write your first SOP, start to finish. Built for HVAC, plumbing, cleaning and other service teams of 2–50.

1 Pick the right process first

- ☐ It happens at least once a month
- ☐ A mistake would cost you money, a job or a customer
- ☐ More than one person does it, or will soon
- ☐ You're the only one who knows how to do it
- ☐ **Start with the one that goes wrong most often** or eats the most time (2+ boxes checked? Write it down)

2 Set it up before you write

- ☐ **Name it with a verb:** "Book a new service call," not "Phones"
- ☐ **Write the trigger:** what kicks it off (a call comes in, a job is marked complete)
- ☐ **Write the done point:** how you know it's finished
- ☐ **Name one owner by role,** not by person ("Dispatcher," not "Jen")
- ☐ **List the tools:** software, forms, folders and links the job needs

3 Write the steps

- ☐ **Do the job once and write each step as it happens.** Don't write from memory; you'll skip the steps you do on autopilot
- ☐ **One action per step, starting with a verb:** "Open the schedule and click New Job"
- ☐ Aim for **5–15 steps.** More than 20? Split it into two SOPs
- ☐ Give every step **an owner (role) and a time** (same day, within 2 hrs)
- ☐ Say **exactly where:** the folder, link or menu path
- ☐ Add a photo or screenshot for any tricky step
- ☐ Replace "ASAP" and "as needed" with a real amount and deadline

4 Say what "done right" looks like

- ☐ Add **3–5 quality checks:** things that must be true before the job counts as done
- ☐ Make each check something you can see or confirm ("Customer got a text confirmation")
- ☐ Add what to do when the usual thing goes wrong, and who decides

5 Test it with someone new

- ☐ Hand it to someone who has never done the job
- ☐ Watch them use it **without helping**
- ☐ Every time they pause or ask a question, fix that step
- ☐ When they finish it right with no help, call it **version 1.0** and date it

6 Keep it alive

- ☐ Save every SOP in **one shared folder** and keep a simple list: name, owner, version, last reviewed
- ☐ Review each SOP **every 6–12 months,** and any time a tool, price or person changes
- ☐ Track changes: 1.1 for a small fix, 2.0 for a big change
- ☐ Train new hires from the SOPs. If they get stuck, the SOP gets better
- ☐ Never put passwords or alarm codes in an SOP

7 Check you've avoided these mistakes

- ☐ Writing how it *should* work. Write how it really works today
- ☐ Paragraphs of policy. Link to the policy instead
- ☐ An SOP longer than 1–2 pages
- ☐ Filing it and forgetting it

Good first SOPs for a service business

- ☐ Answering and booking a new service call
- ☐ Building and dispatching the day's schedule
- ☐ Following up on an estimate
- ☐ Handling a customer complaint
- ☐ A new hire's first week
- ☐ Opening and closing the office or shop

My first SOP: _____

Owner (role): _____

Done by (date): _____